

Jolly Presents...

ID Flow 4 Getting Started Guide

An Introduction to ID Flow

Contents

Introducing ID Flow 4.....	3
The Quick Start Option	4
ID Flow Card Designer	6
Databases.....	6
Design Screen.....	7
Working with Text.....	8
Working with Layers	9
Viewing Designs with Live Data	9
Working with Print Conditions.....	10
Saving a File.....	10
ID Flow Card Issue Center	12
Global Settings	12
Workstation Settings	14
Importing a Card Design	14
Enrollment Configuration	15
Record Lookup Configuration	17
Report Center Configuration	18
Record Center	19
Configuring the Record Screen	20
Advanced Field Formatting.....	20
Configuring Language	21

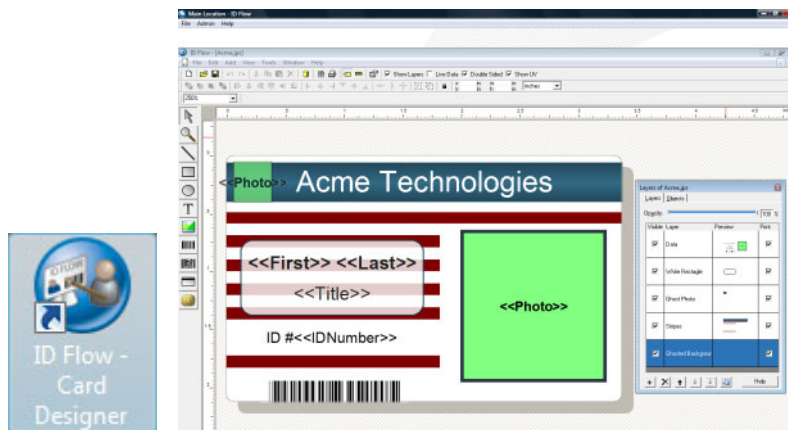
Introducing ID Flow 4

ID Flow is premier software for ID card design, production and data management.

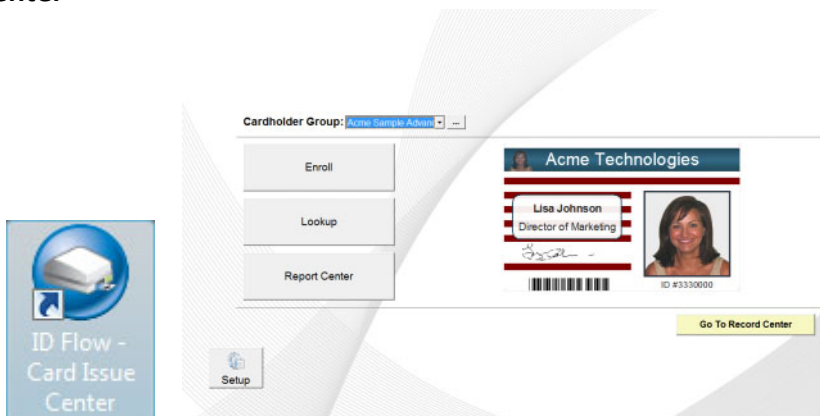
This guide provides basic understanding of product components and how to get started. This guide is a supplement to the Help Menu provided within the product. The built-in Help Menu provides comprehensive configuration details for each dialog.

There are two primary ID Flow interfaces:

Card Designer



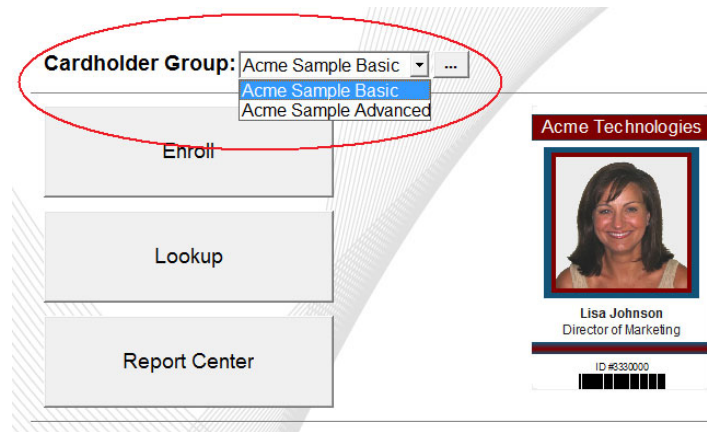
Card Issue Center



Use the *Card Designer* to create your card designs and point them to the appropriate data source. Once the designs are completed and saved, import the designs into the *Card Issue Center* for production and data management.

The Quick Start Option

ID Flow Card Issue Center is pre-configured with two sample Cardholder Groups: *Acme Sample Basic* and *Acme Sample Advanced*.

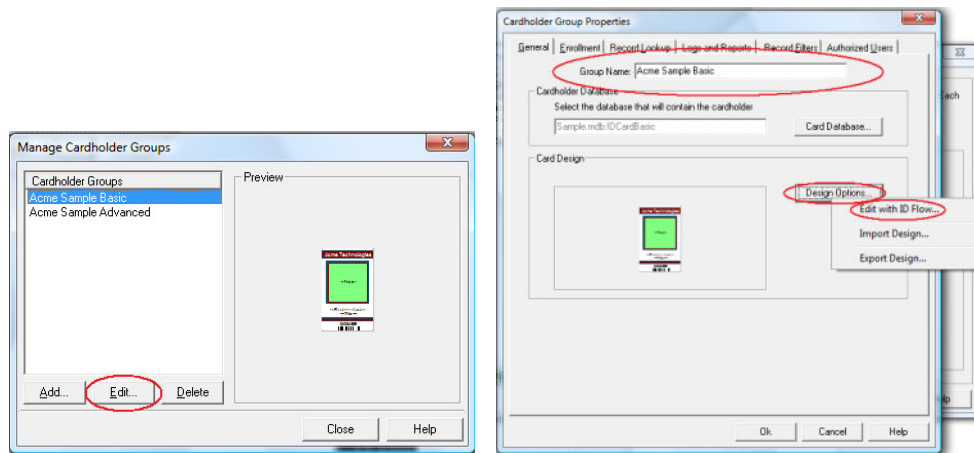


The *Basic* group has six data fields and a single-layer card design. The *Advanced* group has additional fields, including signature and fingerprint fields, and a multi-layered card design. These card designs are linked to a sample database that includes four sample records. The card designs, data and data fields may be modified.

To use a sample group to get started, click the ellipsis button to the right of the *Cardholder Group*:



This will open the *Manage Cardholder Groups* dialog. Highlight the group and select *Edit*. Rename the group to an appropriate name and select *Design Options*, then select *Edit with ID Flow...* to edit the design.



After design modifications are finished click *Exit* and *Save* , click *OK* on the *Cardholder Group Properties* dialog, and click *Close* on the *Manage Cardholder Groups* dialog.

Once completed, enroll new cardholders using by clicking the *Enroll* button and see records by clicking the *Record Screen* button. Sample records may be deleted, but it is suggested a new record be added first so that the data set is not empty.

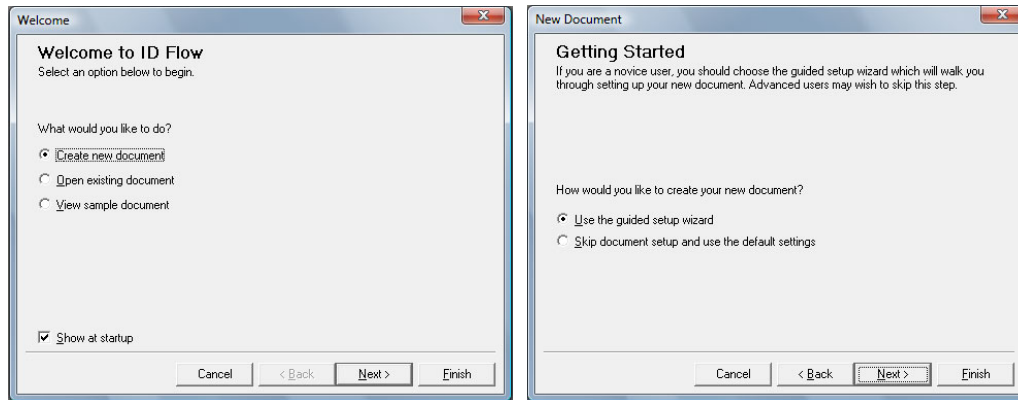
Modifications to the enrollment process, record look up and logs and reports are configured and the *Cardholder Group Properties* dialog shown above and will be explained in the *id flow Card Issue Center* section below.

Additional sample card designs are available in the *ID Flow Card Designer*.

ID Flow Card Designer

ID Flow Card Designer is used to create ID card designs. A guided setup wizard will walk you through selecting card stock, card format, single/double-sided, connecting to a data source, selecting text and image fields for the design, setting a background and password protection.

To use the wizard select *Create new document* and *Use the guided setup wizard*:

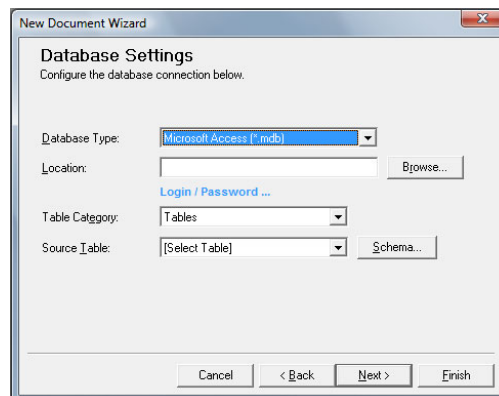


Databases

The setup wizard presents three database options:

1. Use existing database
2. Use sample database
3. Create a new MS Access database

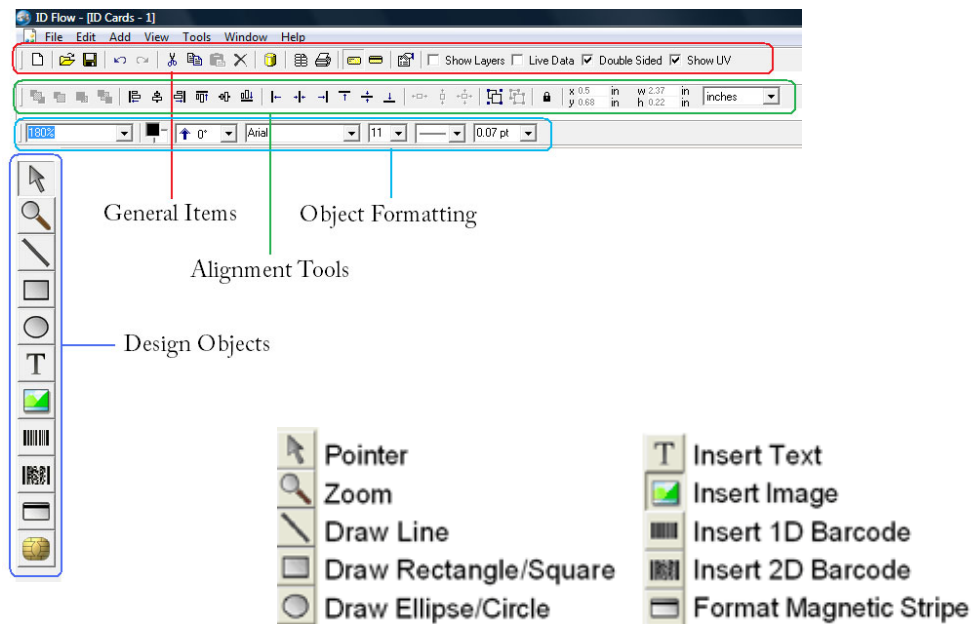
To use an existing database: Select the database type, the location and its table, view or join.



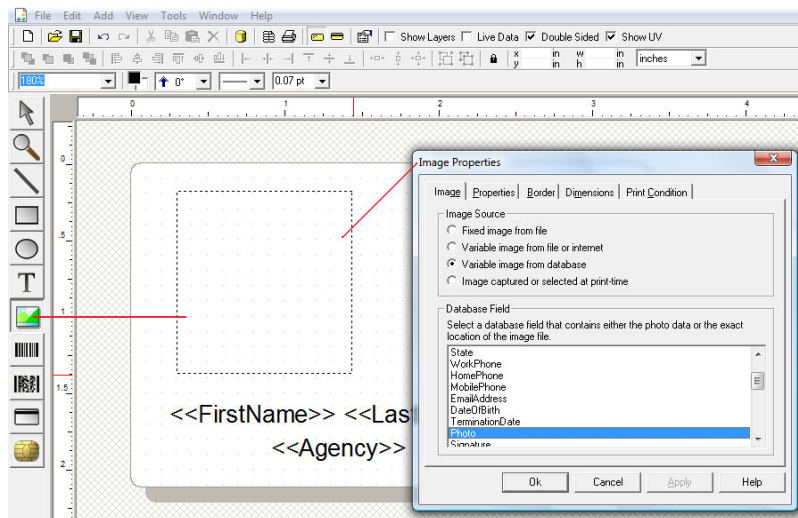
Jolly Products are open-data architecture. ID Flow has the ability to use existing data sources as the basis for ID card design and production. The *Database Settings* dialog shown above established a live connection to an existing database. **Any modifications to the schema and the data will apply instantly to the existing database.**

Design Screen

The design screen contains four toolbars: general items, alignment tools, design objects and object formatting.



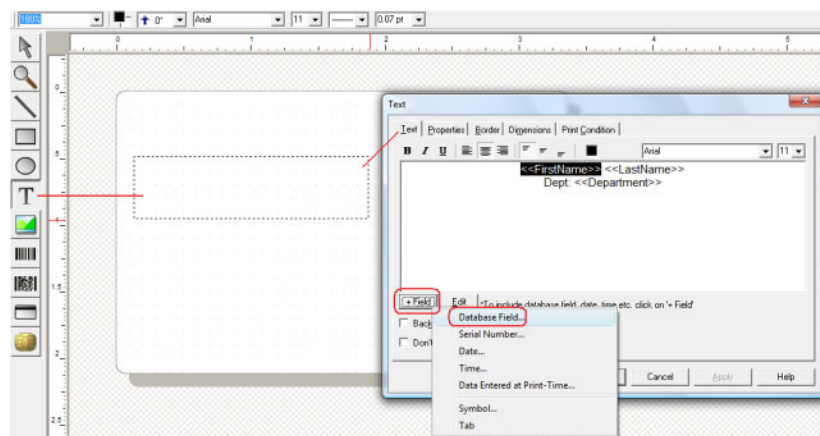
Cards are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



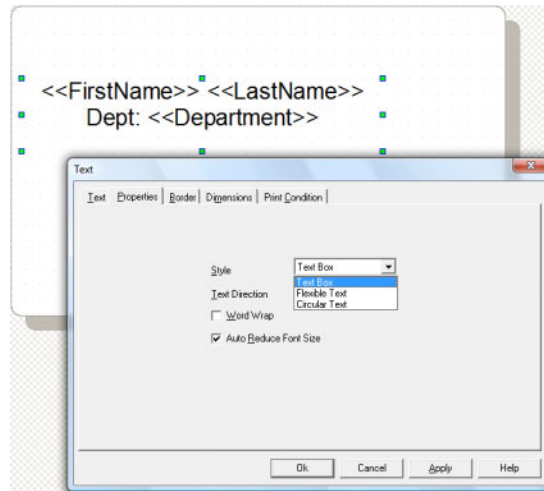
Objects may be resized at any time and *Properties* dialog re-accessed by double-click.

Working with Text

ID Flow contains rich text editing. Regular text, database text, serial number, date and time may be combined within one text box. Type with a keyboard or use the *+ Field* button for text selections.



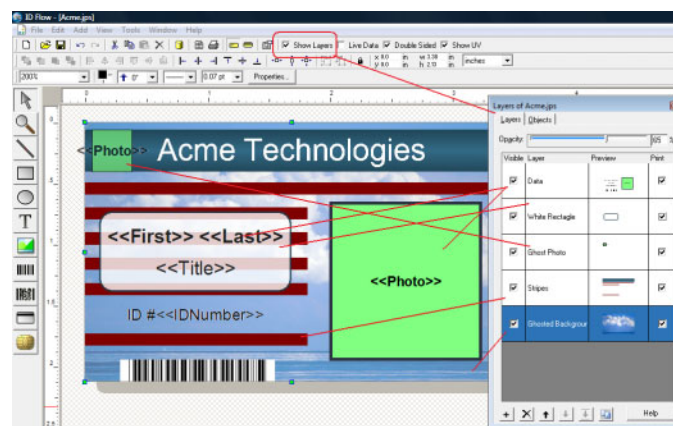
There are three types of text formatting: Text Box, Flexible Text and Circular Text. *Text Box* will always place text within the bounds of the box drawn in the design: If larger, it will auto-reduce in font size or word wrap. *Flexible Text* will maintain font size regardless of the size of the box drawn. *Circular Text* formats text in a circle.



Working with Layers

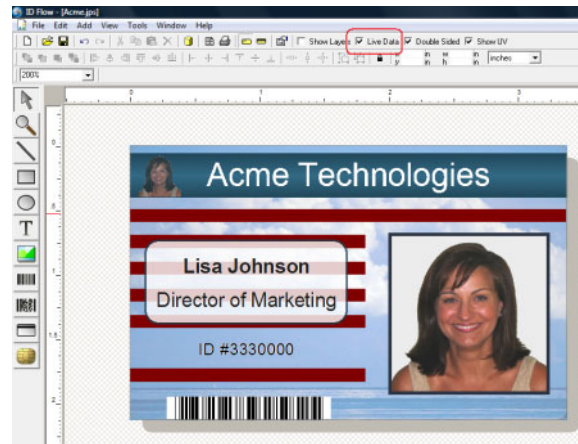
Like other quality graphical design tools, ID Flow uses a layered design approach. Layers may contain different design objects of varying opacity. Using layers adds a rich depth to design and creates highly secure cards.

To see the layers window click the *Show Layers* checkbox on the top menu bar. Layers are added using the [+] button at the bottom of the window. Use the arrow buttons to move layers above and below other layers. Click the *Print* checkbox on each layer to format its print condition. The active design layer is highlighted blue.

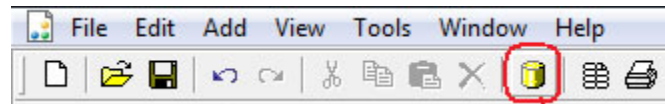


Viewing Designs with Live Data

At anytime the card design may be viewed with data by checking the *Live Data* button on the top menu bar:

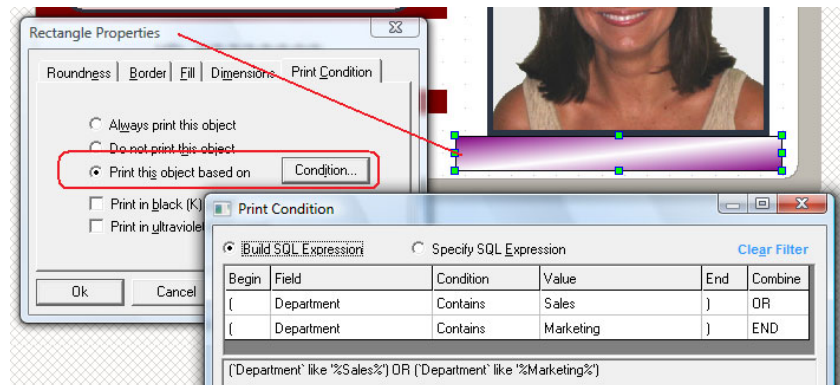


To view the full record set: go to *File -> Database Setup* or click the data icon on the top menu bar:



Working with Print Conditions

Design objects or design layers may be set to print only if specific database conditions are met. Print conditions are set on the *Print Conditions* tab of the object's properties dialog. K Panel (Black Panel) and UV Panel are also set on this tab.



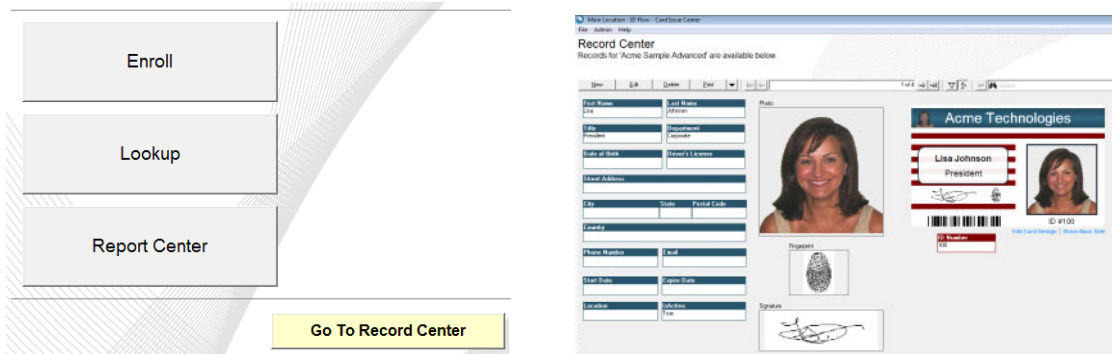
Saving a File



Use *File -> Save* or *Save as...* to save and name the design. ID Flow files are saved with a .jps extension. Though cards can be printed from the design screen or *Database Setup*, design files are typically imported into the *Card Issue Center* for production.

ID Flow Card Issue Center

The *Card Issue Center* is used for day-to-day data entry and production of ID cards. It allows the user to enroll new cardholders, lookup an existing record and view reports of all actions that have occurred. The *Record Center* shows all database records and their ID card design.

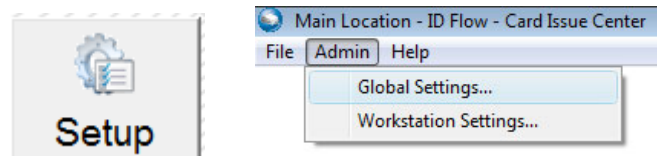


Card designs are typically first created in *ID Flow Designer* and then imported into *ID Flow Card Issue Center*.

Card Issue Center is designed so that multiple locations may be networked through sharing a central file. For this reason, there are two types of configuration settings: *Global* and *Workstation*.

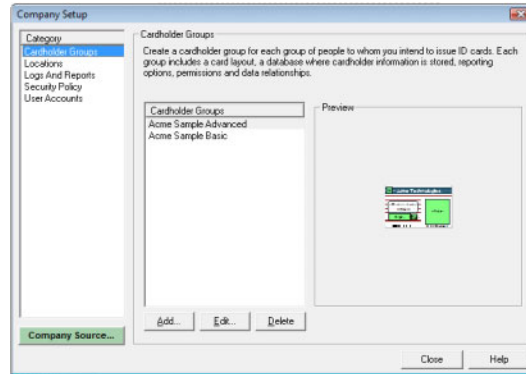
The Small Business Edition does not have networking abilities; however, it also contains Global and Workstation settings.

To Setup, select the setup button on the *Main Menu* screen or from the Admin Menu. Only Administrators have setup ability



Global Settings

Global Settings are configured in the *Company Setup* dialog. Depending on the edition, it may contain Cardholder Groups, Locations, Logs and Reports, Security Policy, User Accounts and the Company Source.

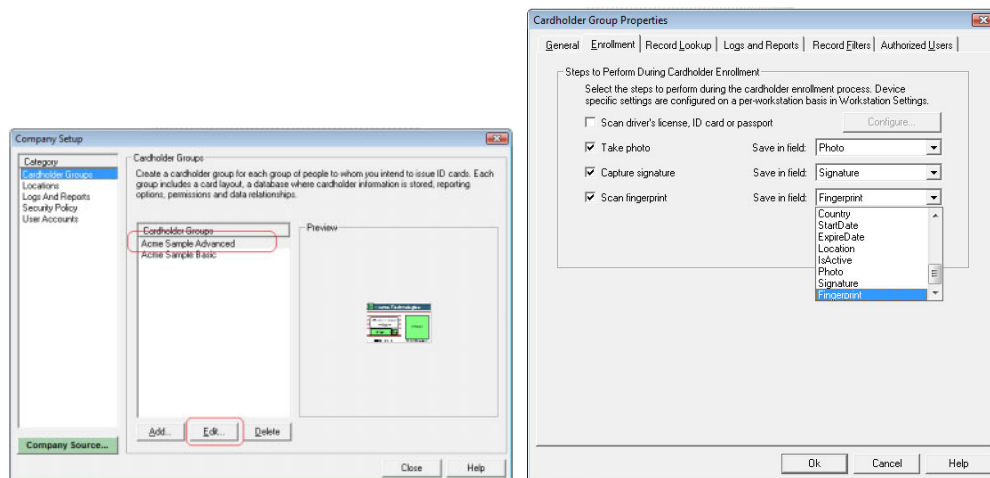


The *Company Source* is the central database file that, for networked versions, should be placed on a secure internal server or shared workstation. For stand-alone copies it does not need to be moved.

Settings for *Locations*, *Logs and Reports*, *Security Policy* and *User Accounts* are obvious when the dialog is open.

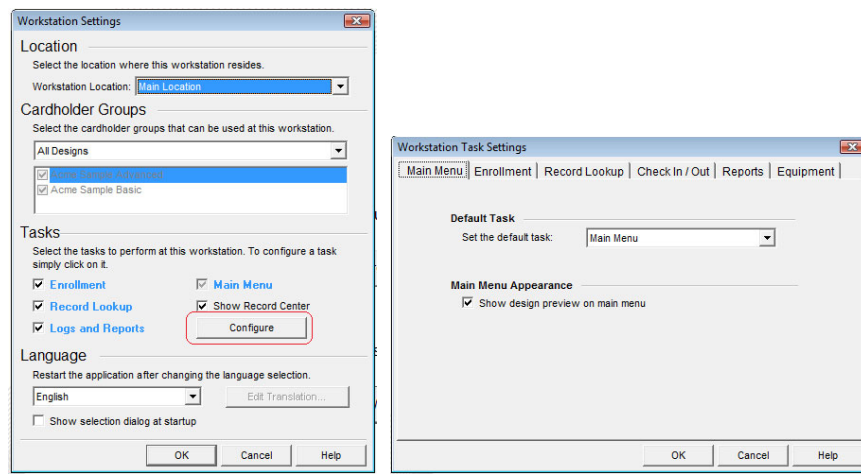
Cardholder Group settings work in tandem with Workstation settings. Examples: 1. In order to capture a signature in the enrollment process, the signature field must be defined in the cardholder group's *Enrollment* tab; 2. In order to lookup a record by email address, that field needs to be defined in *Record Lookup* tab; 3. In order to log the name and titles of cardholders, those fields must be defined in the *Logs and Reports* tab.

To configure the cardholder group's settings, highlight the group and select edit.



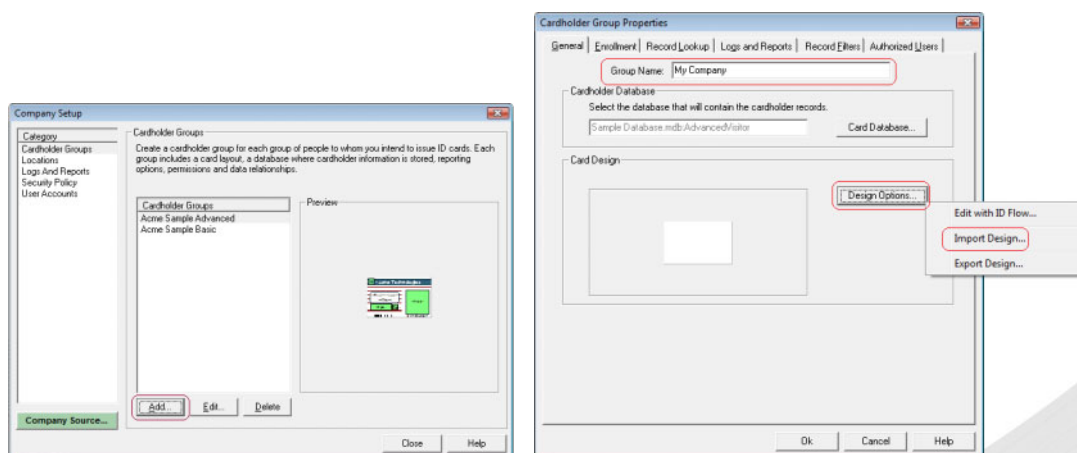
Workstation Settings

Workstation settings apply to the specific workstation. They include selecting the location, cardholder groups available at this location, selecting which tasks will be available to the user, configuring the tasks and capture devices, and selecting the language to be used at this location. Tasks are configured individually through the task's blue hyperlink or together via the configure button:



Importing a Card Design

Card designs are typically first created in *ID Flow Card Designer* and then imported into *ID Flow Card Issue Center*. To add a new card design, Go to *Global Settings -> Cardholder Groups* and select "Add." This will open the *Cardholder Group Properties* dialog.

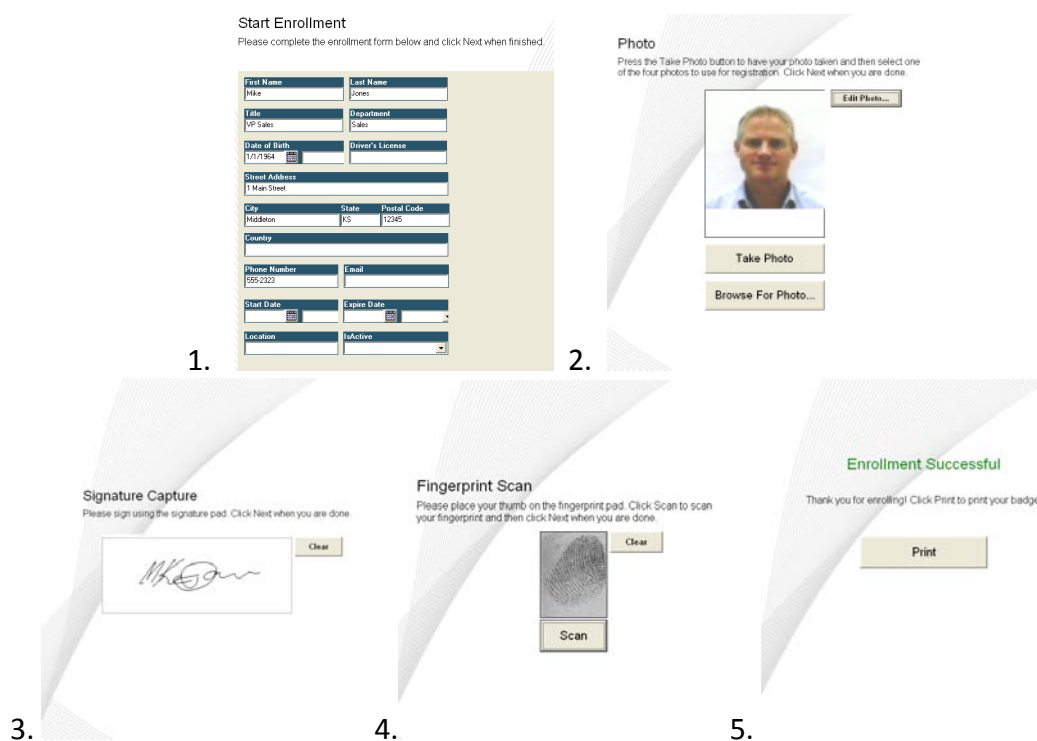


Enter a *Group Name* then select *Design Options* and *Import Design*. Browse to the .jps file created in *Card Designer*. The option will be provided to import the designs database with the design. If so, it will automatically populate the *Card Database* dialog. Next, select the fields in the *Enrollment*, *Record Lookup* and *Logs and Reports* tabs.

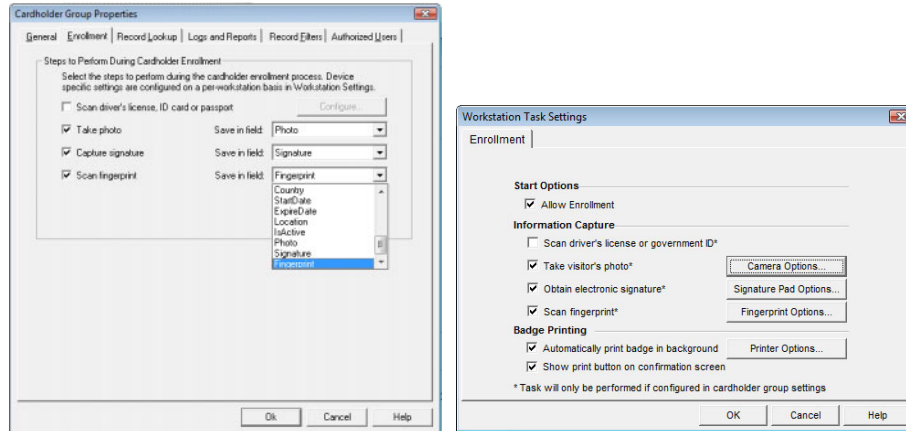
Important note on imported designs: It is a *copy* of the design that is imported into *Card Issue Center*. Changes made to the design using *Card Designer*, must be re-imported for the changes to be reflected in *Card Issue Center*. Changes can be made directly to the *Card Issue Center* copy by selecting *Edit with ID Flow...* in the *Cardholder Group Properties* dialog. In this instance, changes made to the imported copy are not reflected in the original copy.

Enrollment Configuration

Users define the relevant workflow for enrollment. Available steps include Data Entry, Photo Capture, Signature Capture, Fingerprint Capture and Card Printing:



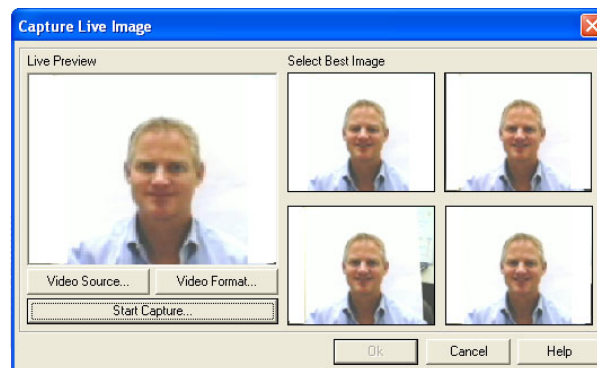
To configure photo capture, driver's license scan, signature capture and fingerprint scan in enrollment, first define fields in the Cardholder Group Properties (Global Settings), and then define the process available in the workstation settings:



The capture device specifications are configured by clicking the *Options* buttons in the *Workstation Task Settings*.

Notes about capture devices:

ID Flow supports TWAIN and WIA compatible cameras. The ability to capture a photo from within ID Flow and trigger the flash will depend upon the camera's software. ID Flow is commonly used with web cams: When Microsoft WDM is invoked as the capture source, four photos are captured and the best may be chosen.



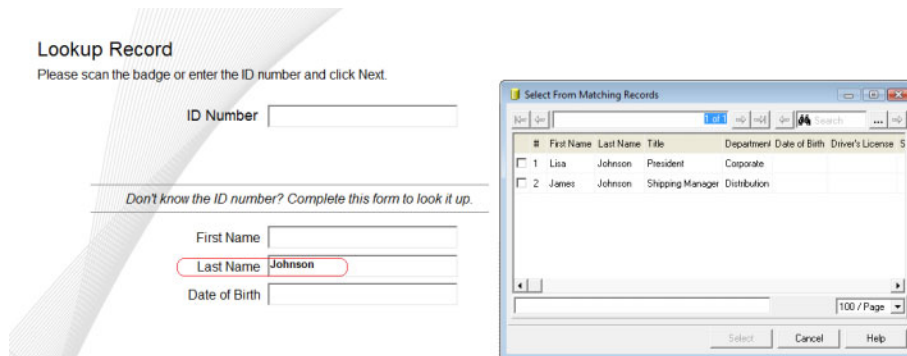
ID Flow supports Topaz and Interlink USB signature and fingerprint pads.

ID Flow support Card Scanning Solutions ScanShell 800, ScanShell 1000 and SnapShell camera for driver's license and/or passport scanning. It does NOT support the 800N.

Some device files and drivers may be found under "add-on modules" on the "Download" section of the www.jollytech.com website.

Record Lookup Configuration

Record Lookup allows the user to quickly search for records. When multiple matches occur a selection dialog is shown. Strict matching may be invoked.



Lookup Record
Please scan the badge or enter the ID number and click Next.

ID Number

Don't know the ID number? Complete this form to look it up.

First Name

Last Name

Date of Birth

Select From Matching Records

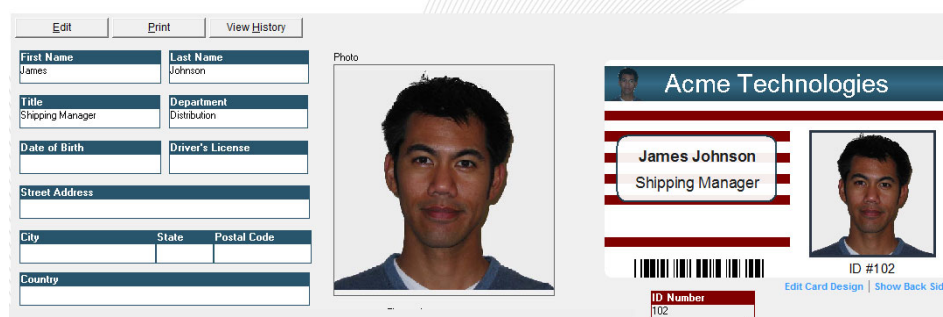
#	First Name	Last Name	Title	Department	Date of Birth	Driver's License
1	Lisa	Johnson	President	Corporate		
2	James	Johnson	Shipping Manager	Distribution		

100 / Page

Select Cancel Help

Record Found

The following matching record was found.



Edit Print View History

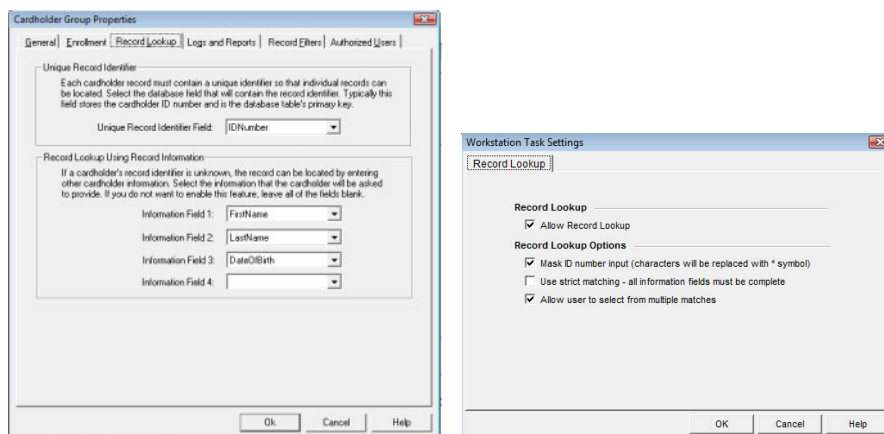
First Name James
Last Name Johnson
Title Shipping Manager
Department Distribution
Date of Birth
Driver's License
Street Address
City **State** **Postal Code**
Country

Photo

Acme Technologies
James Johnson
Shipping Manager
ID #102
Edit Card Design Show Back Side

ID Number
102

To configure record lookup, first define the lookup fields in the *Lookup Fields* tab of *Cardholder Group Properties* dialog found in *Global Settings*, then, define the options in the *Workstation Settings*.



Cardholder Group Properties
General Enrollment **Record Lookup** Logs and Reports Record Errors Authorized Users

Unique Record Identifier
Each cardholder record must contain a unique identifier so that individual records can be located. Select the database field that will contain the record identifier. Typically this field stores the cardholder ID number and is the database table's primary key.

Unique Record Identifier Field: IDNumber

Record Lookup Using Record Information
If a cardholder's record identifier is unknown, the record can be located by entering other cardholder information. Select the information that the cardholder will be asked to provide. If you do not want to enable this feature, leave all of the fields blank.

Information Field 1: FirstName
Information Field 2: LastName
Information Field 3: DateOfBirth
Information Field 4:

OK Cancel Help

Workstation Task Settings
Record Lookup

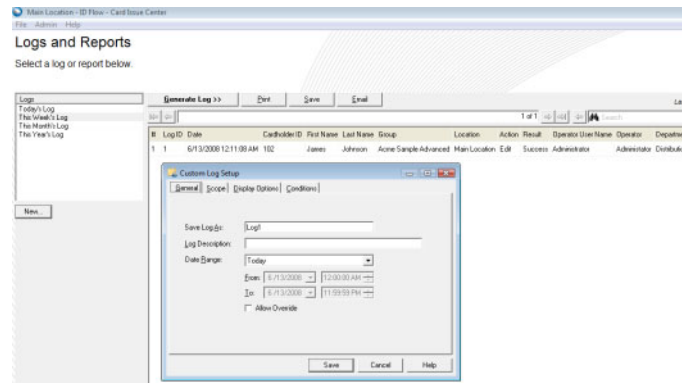
Record Lookup
☒ Allow Record Lookup

Record Lookup Options
☒ Mask ID number input (characters will be replaced with * symbol)
☐ Use strict matching - all information fields must be complete
☒ Allow user to select from multiple matches

OK Cancel Help

Report Center Configuration

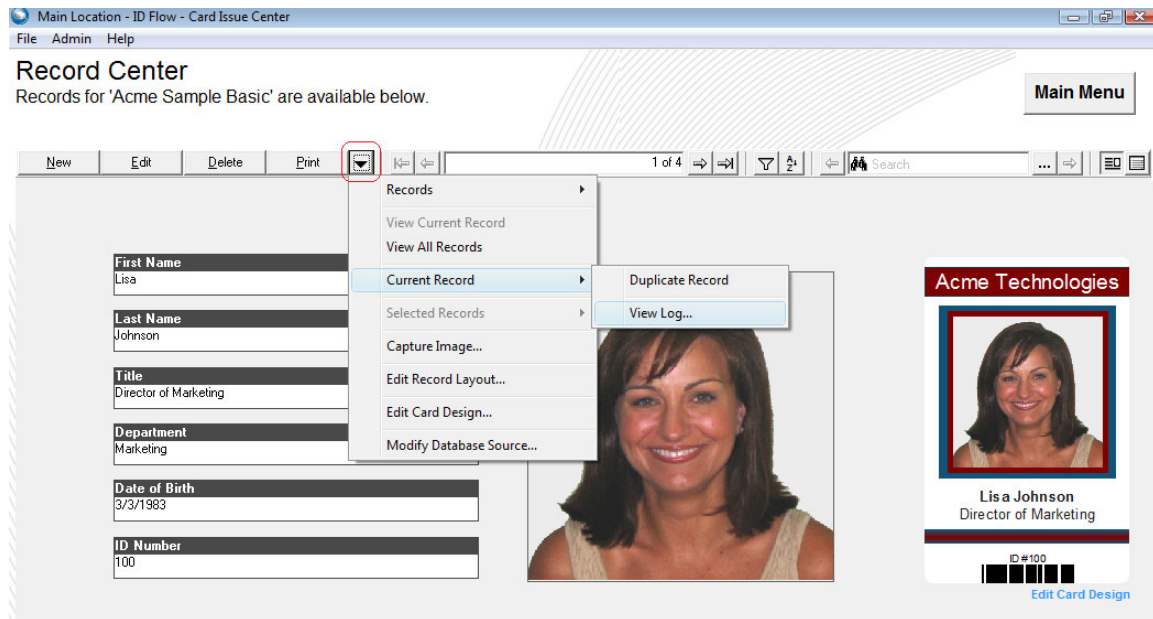
Logs and Reports shows activity on all actions that occur in the product: when a record was added, edited or deleted and when card was printed; by whom, at what time and location. Custom logs may be designed. Reports may be printed, exported and emailed.



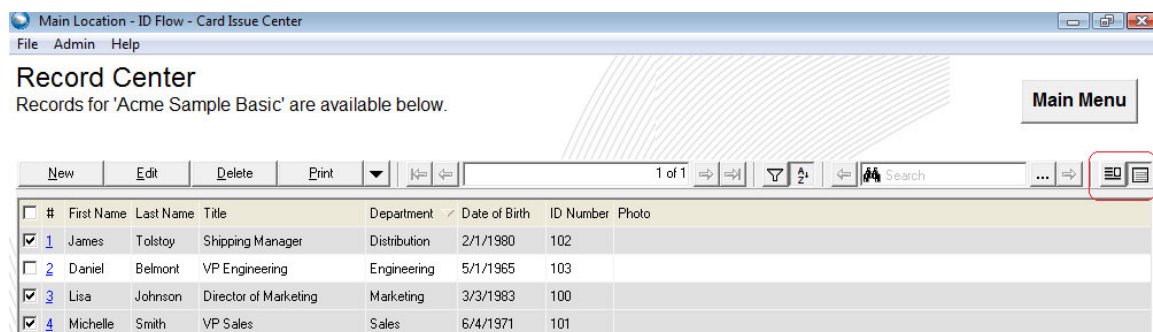
Four fields from a cardholder's record may be configured in the *Logs and Reports* tab on the *Cardholder Group Properties* dialog. The *Workstation Setting for Logs and Reports* makes the item available or not.

Record Center

Record Center is used for the management of records. Records may be added, edited, deleted, printed and duplicated from this screen. The down-arrow button provides additional options.

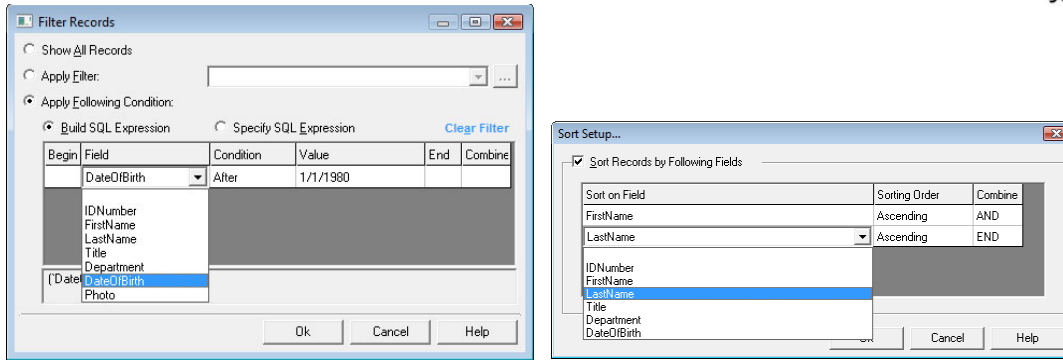


Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



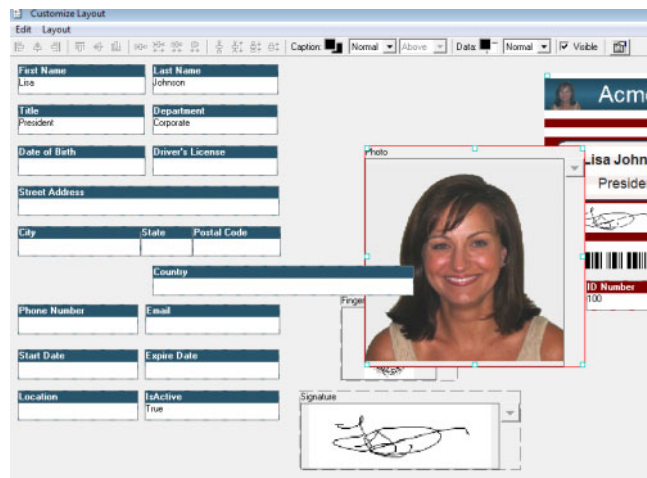
Records may be batch printed, deleted and edited by checking the box to the left of the record and selecting the appropriate action. Records may be sorted by clicking on column headers.

The toolbar contains *filter* and *sort* buttons . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.



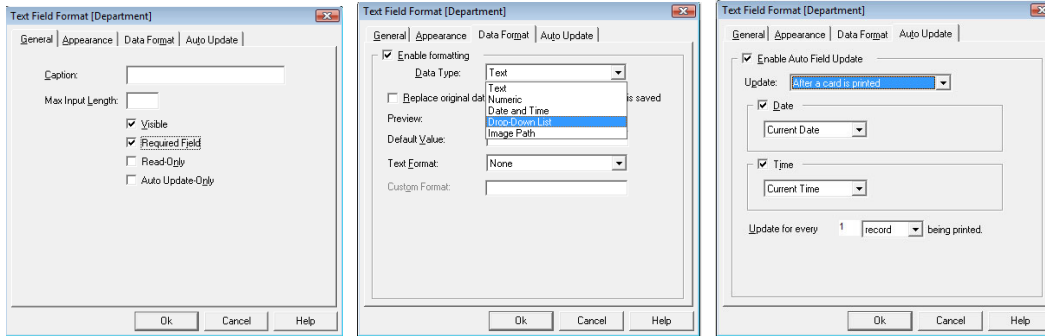
Configuring the Record Screen

ID Flow Enterprise and Corporate Editions have drag-and-drop record screen formatting. Select *Edit Record Layout* from the down-arrow menu on the *Record Screen*: Size and move fields with the mouse. Caption placement, colors and alignment tools are provided on the menu bar.



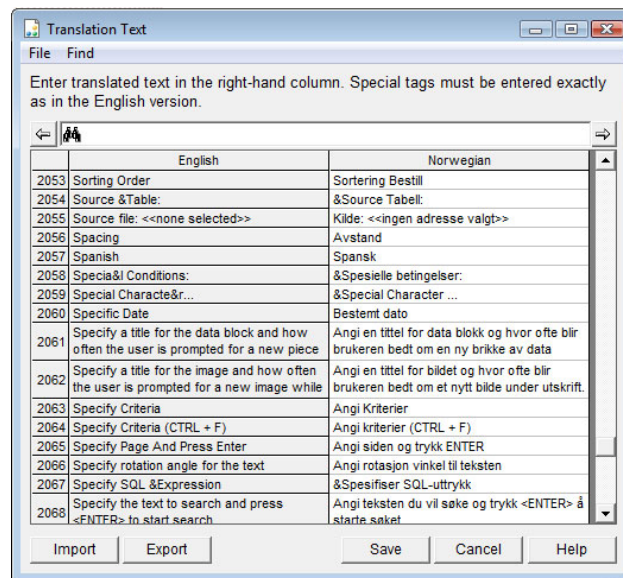
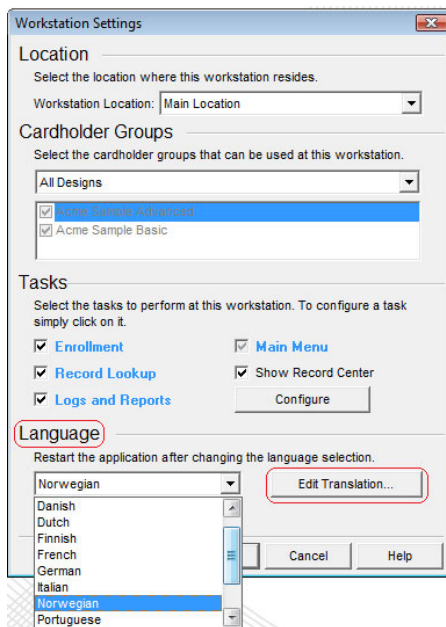
Advanced Field Formatting

ID Flow Enterprise Edition contains advanced field formatting. To configure a field, double-click on the field while in *Edit Record Layout*. Fields may be made *Visible*, *Required* and *Read Only*. They may be given default values. Drop-down lists may be created. Text can be set to Capitalize, UPPER CASE or lower case. Image paths may be created to store variable images to file. Fields can automatically update after a card is printed.



Configuring Language

ID Flow is available in 10+ languages. Select the language in the Workstation Settings. A translation table allows the user to make changes to the translation or to translate into a language not yet provided by Jolly. After changing languages, restart the program.



The information contained in this document represents the current view of Jolly Technologies on the issues discussed as of the date of this publication. This paper is for informational purposes only. Jolly Technologies makes no warranties, express or implied in this document. Jolly, Jolly Technologies, ID Flow, Lobby Track, and Command Line Utility are either trademarks or registered trademarks of Jolly, Inc. in the United States of America and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.